

GLOBALIZATION OF DATA MANAGEMENT

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Globalization Issues

- Information technology integration
- Records management integration
- Intellectual property awareness
- Management at the enterprise level
- Focus on retrievability

Records Management Integration

- **Records Management organizations**
tend to have processes siloed from DM processes
- **Records Management organizations**
tend to manage historical documents
- **Records Management organizations**
tend to work paper folders
- **Records Management organizations**
tend to work to functional schedules

Records Retention

Records Retention - Functional Driven Review Dates

RECORD TYPE	RECORD SUBTYPE	RETENTION PERIOD	NEXT REVIEW DATE
Personnel folders	Former employees	20 years	Initially set at 20 years after employee termination
Personnel folders	Active employees	Indefinite	Maintained as part of normal business practice until file transfers to "Former employee status" upon employee termination.
DD250s	All	7 years post contract	Initially set at 7 years post period of performance

Records Retention - Program Driven Review Dates

RECORD TYPE	RECORD SUBTYPE	RETENTION PERIOD	NEXT REVIEW DATE
DD250s	ABC program	15 years post contract	Initially set at 15 years post period of performance
DD250s	XYZ program	20 years post contract	Initially set at 15 years post period of performance
Test documentation	XYZ program	Life of program	Initially set at designed system service life

Records Retention - Media Driven Review Dates

MEDIA TYPE	RECORD SUBTYPE	RETENTION PERIOD	NEXT REVIEW DATE
3 1/2" disk		3 years	Initially set e years post date of last update
Compact disk		5 years	Initially set 5 years post date of last update
Zip drives			

Information Technology Integration - Shared Concerns

- Data protection from unauthorized accessibility - all environments
 - Unauthorized users
 - Nondisclosure agreements between parties
- Data development environments
 - DocuShare or other collaborative environments
 - Getting off the “C” Drive
- Repository considerations - accessibility, access, size
- Disaster risks - recovery capability by system
- Choosing media - zip drives/sticks/CDs
- Choosing internal software based on licensing considerations
- Software migration considerations

Intellectual Property Awareness

- **What's crossing e-mail - avoid technical data and avoid proprietary data**
- **Protect your trade secrets through the life cycle**
- **Avail guidance to staff and keep it simple**
- **Ensure property rights marking**

Management at the Enterprise Level

- Who manages the data DM doesn't?
 - Who manages e-mail content? Do we care?
 - Who manages everyone's working data? Do we care? Examples: on-line configuration control boards
 - Who reviews file cabinet content? Do we care?
 - Who's sending "snail mail" and why? Do we care?
- Compliance with the Sarbaine/Oxley law
 - What can you purge?
 - What's the decision process?
 - What controls are in place?

Focus on Retrievability

- How do we measure our retrievability success?
- How do we get successes and failures measured across the enterprise?
- What do we learn when we are unable to retrieve certain data?
- How do we adjust processes to prevent future data loss?

Global (enterprise) answers are needed ...

- 1. To answer: When do we migrate to a new format?**
- 2. To answer: What do we put in an archival format?**
- 3. To answer: Where is the index for XYZ program records?**
- 4. To answer: Who has the “big picture” and where are the enterprise “holes”?**